

# ELEVATE YOUR MARKETING: WEALTHCARE'S AI PLAYBOOK FOR ADVISORS



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## Section 1:

# INTRODUCTION TO AI

Advisors have to work harder than ever to stand out in a crowded and competitive industry, and marketing is a critical tool to make sure prospects and clients know who you are. At the same time, artificial intelligence tools are becoming ubiquitous. If you're not already leveraging them to create efficiencies, you're not going to keep up with advisors who are embracing AI.

However, most generative AI tools are not specifically trained on our industry and are therefore not likely to produce 100% accurate content. Just as importantly, the content won't sound like you, so it won't resonate with your clients. The key to using AI in your marketing effectively is building strong prompts.

This guide includes information on the different types of AI you can use, as well as easy-to-follow guidance on creating prompts to get the most out of these tools to elevate your marketing efforts.

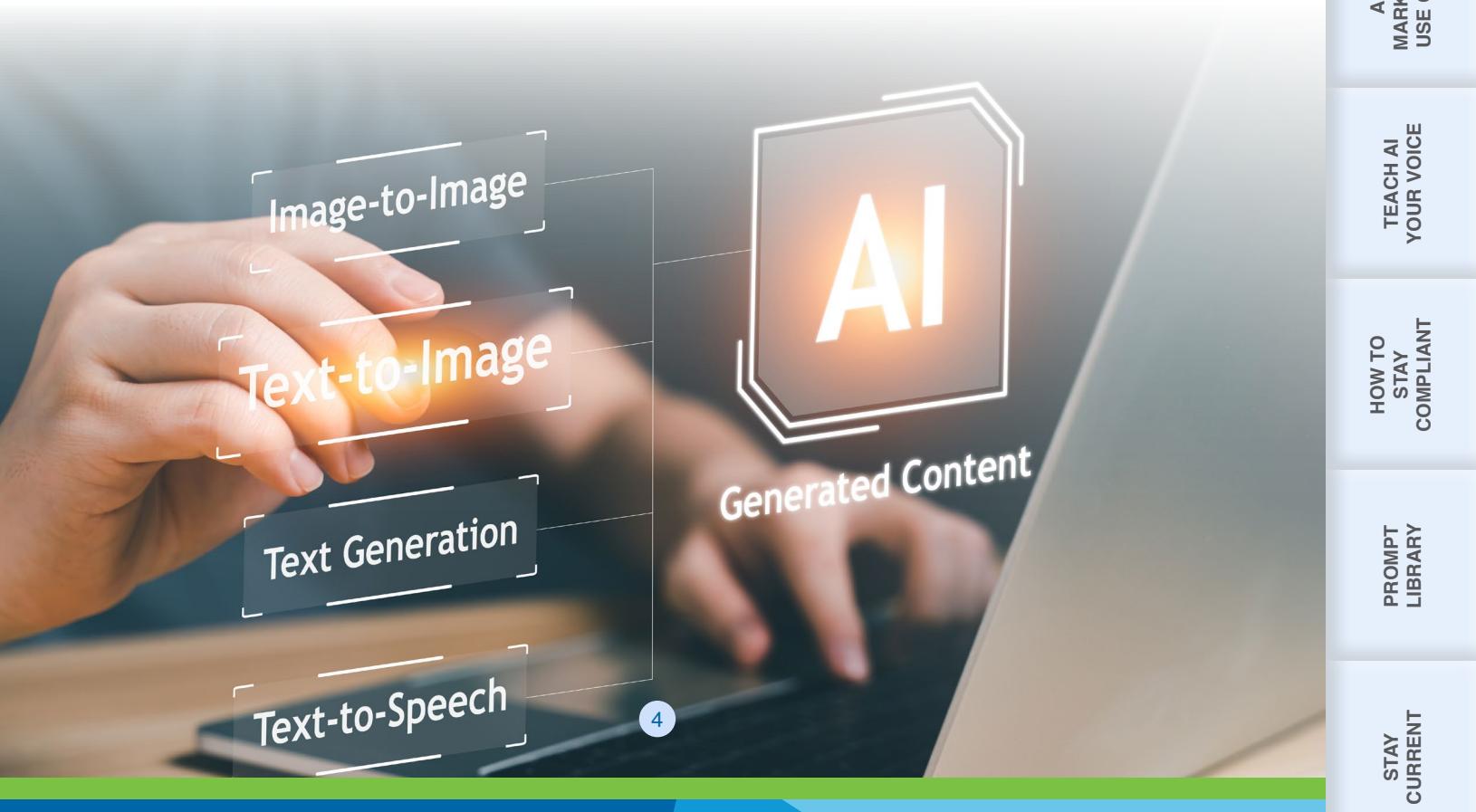
Since AI is so powerful, ignoring it is no longer an option if you want to remain competitive. However, not all financial advisors feel the same about its widespread adoption.

## Section 2:

# TYPES OF AI

There are several ways to categorize AI tools. The method most useful to us today is categorization by purpose. While there are several additional purpose categories, when it comes to marketing, the most useful types of AI include:

- Generative AI:** Focuses on creating new content, such as images, music, or text. It relies on unsupervised learning to generate realistic outputs.
- Multimodal AI:** Generates cross-modal content, integrating multiple data types like text, images, and audio.
- Assistive AI:** Designed to assist humans in various tasks, enhancing productivity and efficiency.



### Section 3:

## AI TOOLS

There are many AI-powered tools for creating and editing marketing materials. It seems like a new tool emerges every month. The following list of tools aren't recommendations or Healthcare partners, but a list of some of the most common AI-powered tools being used at the moment.

### **ChatGPT (OpenAI):**

A large language model chatbot designed for generating text, answering questions, and creating content.

### **Copy.ai:**

An AI-powered tool for marketing and sales, generating copy for emails, social media, and ads, with features for tone customization and plagiarism checks.

### **Canva Magic Write:**

An AI writing assistant integrated into the Canva design platform, useful for creating marketing copy and social media posts.

### **Perplexity AI:**

An AI-powered search engine that provides accurate, sourced answers and summarizes complex topics, making it ideal for research.

### **Levitate.ai**

A compliance-approved relationship marketing platform that uses AI to automate tasks such as sending personalized emails and social media posts, managing contact information, and scheduling meetings.

## Cap Cut:

An all-in-one video editing tool that helps you create attention-grabbing videos for social media.

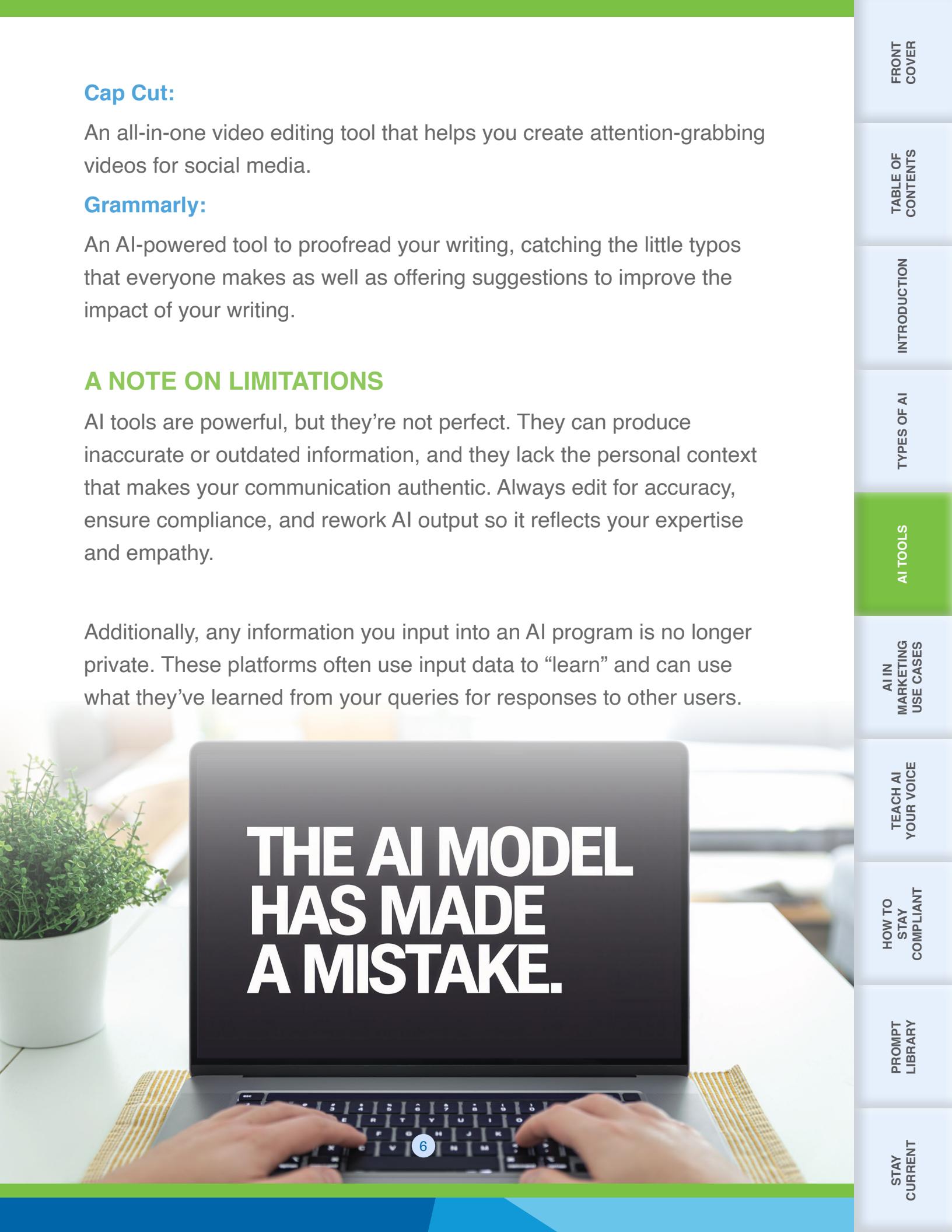
## Grammarly:

An AI-powered tool to proofread your writing, catching the little typos that everyone makes as well as offering suggestions to improve the impact of your writing.

## A NOTE ON LIMITATIONS

AI tools are powerful, but they're not perfect. They can produce inaccurate or outdated information, and they lack the personal context that makes your communication authentic. Always edit for accuracy, ensure compliance, and rework AI output so it reflects your expertise and empathy.

Additionally, any information you input into an AI program is no longer private. These platforms often use input data to “learn” and can use what they’ve learned from your queries for responses to other users.



THE AI MODEL  
HAS MADE  
A MISTAKE.

## Section 4:

# AI IN MARKETING USE CASES

According to research from Accenture, AI has been shown to boost financial advisors' lead generation by as much as 50%. Clearly, AI has become a critical marketing tool that can support your marketing efforts in several ways.

## SEGMENTATION

You can use AI to analyze your client data and segment your client base, ensuring you promote the right services to clients at the right times, making your marketing efforts more effective.

## PERSONALIZATION

Similarly, knowing what your clients want can help you identify the topics and messages your clients want to receive, another proven way to achieve higher rates of engagement, conversions, and revenue growth.

## CONTENT

AI-powered tools can help you create content. But we recommend caution when using AI to write emails, social media posts, blogs and longer forms of written content. As mentioned, there is a high risk of inaccurate materials or that it won't accurately reflect your voice. In addition to written materials, you can use AI to create, edit, and amplify your images and videos.

## PROOFREADING AND EDITING

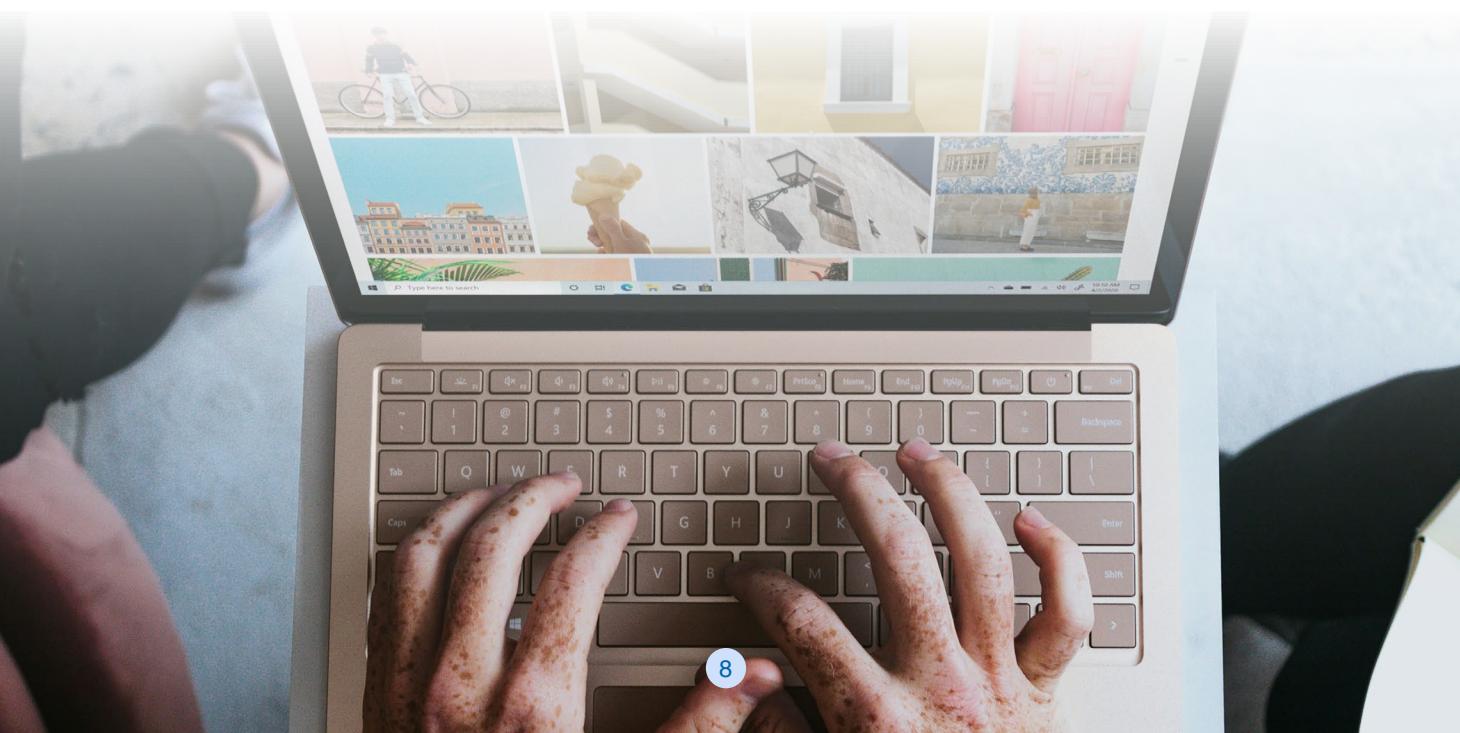
You've probably used spell check in Microsoft Word and other document programs, and discovered their weaknesses. AI-powered tools like Grammarly and content generation programs can proofread your writing and make suggestions to strengthen your voice and message. You can also use AI tools to edit images and videos.

## AUTOMATION

If you're running email campaigns or posting regularly to social media, you can leverage automation tools to streamline processes, schedule messages, and reduce the time needed to take care of these important marketing tasks.

## REVIEW AND REFINE

Beyond content creation, AI can help you analyze your marketing results. Tools powered by AI can identify which messages perform best, summarize client engagement trends, and even suggest the best times to post or email. Use these insights to continuously refine your approach and better understand what resonates with your audience.



## Section 5:

# TEACH AI YOUR VOICE

One of the most powerful things you can do to improve the quality of AI-generated content, is to teach your tool of choice to use your voice with powerful prompts. The following prompt structure will help you give AI the information and instructions it needs to know to get it right.

## CORE PROMPT STRUCTURE:

- Role:** Who AI should “be” (e.g., “You are a financial advisor who communicates with professionalism and empathy.”)
- Audience:** Who you’re speaking to (e.g., “Busy professionals in their 40s planning for retirement.”)
- Tone/Voice:** How you want to sound (e.g., “Confident, approachable, and clear, without jargon.”)
- Format:** What you want back (e.g., “A LinkedIn post under 150 words.”)
- Context:** Any background needed (e.g., “Highlight market volatility and the importance of long-term planning.”)

## TIPS FOR CONSISTENCY

- Always restate your voice/tone in every prompt.
- Save strong prompts as templates to reuse.
- Edit AI output to refine accuracy and compliance.
- Iterate: Give AI feedback (e.g., “Make it more conversational” or “Shorten for LinkedIn”).

## Section 6:

# HOW TO STAY COMPLIANT

## REVIEW

Always review content created by AI. Check for accuracy, promissory language, and tone of voice. AI can get you close to a finished product, but needs your touch to be perfect.

## PROTECT CLIENT DATA AND PRIVACY

Never upload or share client or prospect information with AI tools. Treat public AI platforms as open environments. Anything you enter may be stored or used for future training. Avoid including names, contact details, account specifics, or any personally identifiable or proprietary data. When in doubt, err on the side of caution and check with Healthcare Marketing or Compliance.

## SUBMIT

Follow the same compliance review process as you would for content you created by yourself. Not only does this provide one more human checkpoint, but it also ensures that copies of your marketing materials are saved and recorded correctly.

## TRANSPARENCY AND PROFESSIONAL JUDGMENT

AI tools can enhance your productivity, but they do not replace your professional judgment or fiduciary duty. Always verify that your marketing materials align with your advice philosophy and brand voice.

You do not need to disclose AI assistance in your materials, but ensure all messages are fair, balanced, and free from performance promises or predictive statements.



## Section 7:

# PROMPT LIBRARY

### General Style Prompt (to begin all the following)

“You are writing as a financial advisor whose voice is [insert adjective: e.g., confident, empathetic, and approachable]. Avoid jargon, keep it clear and concise, and ensure the message reflects professionalism and trust.”

## BLOGS

### Educational Blog

“Write a [word count] blog post for a financial advisor’s audience of [describe your target clients e.g., mid-career professionals in their 40s with families]. The tone should be [confident, approachable, jargon-free]. The blog should explain [insert topic, e.g., the impact of rising interest rates on retirement savings], include practical tips, and end with a call to action to contact the advisor for guidance.”

### Thought Leadership Blog

“You are a financial advisor who speaks with authority and empathy. Write a blog post for [audience] about [insert trend, e.g., the future of Social Security]. The post should establish expertise, provide context, and give readers a sense of reassurance while encouraging them to think long-term.”

## EMAILS

### Client Update Email

“Draft a short client-facing email from a financial advisor. The tone should be professional, warm, and reassuring. The email should explain [insert topic, e.g., market volatility this week] in simple terms, emphasize long-term planning, and invite the client to reach out with questions.”

### Event/CTA Email

“Write an email to clients from a financial advisor, encouraging them to [insert action, e.g., register for a retirement planning webinar]. Keep it under 200 words, in a professional yet friendly tone, with a clear call to action.”

### Nurture/Value-Add Email

“Draft an email for prospective clients, from a financial advisor, sharing a helpful tip about [insert topic, e.g., maximizing 401(k) contributions]. The tone should be approachable, supportive, and clear. End with an invitation to connect for personalized advice.”

## SOCIAL MEDIA POSTS

### LinkedIn Post (Educational)

“Write a LinkedIn post in the voice of a trusted financial advisor who is approachable and clear. The audience is [insert e.g., busy professionals in their 40s]. The post should be under 120 words, highlight [insert topic, e.g., the importance of staying invested during market fluctuations], and end with a light call to action (e.g., message me to talk about your plan).”

## LinkedIn Post (Personal/Brand)

“Write a short LinkedIn post for a financial advisor, celebrating [insert milestone, e.g., 10 years serving clients]. The tone should be warm, professional, and authentic, expressing gratitude and reinforcing the advisor’s mission.”

## Twitter/X Post

“Write a tweet for a financial advisor that is clear, professional, and concise (under 280 characters). The audience is [insert]. The topic is [insert]. Avoid jargon, focus on one main idea, and keep the tone approachable.”

## Video or Reel Script Prompt

“Write a 45-second video script for a financial advisor to post on LinkedIn or Instagram. The tone should be professional but conversational, with a clear, memorable hook in the first 5 seconds. Topic: [insert, e.g., the importance of staying invested during volatility]. Include a simple call to action and a closing line that reinforces trust and expertise.”

## Section 8:

# STAY CURRENT

The AI landscape changes rapidly, with new tools and updates emerging constantly. Healthcare Marketing will continue monitoring developments and sharing updates on best practices. Revisit this guide periodically to stay current on tools, prompts, and compliance guidance.

For questions, support, or help applying these concepts in your marketing, please contact [marketing@wealthcare.com](mailto:marketing@wealthcare.com).





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